The Boston Foundation’s Centennial Annual Report
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About the Boston Foundation

The Boston Foundation, Greater Boston’s community foundation, is one of the largest community foundations in the nation, with net assets of some $1 billion. In 2015, the Foundation and its donors paid $135 million in grants to nonprofit organizations and received gifts of nearly $123 million. In celebration of its Centennial in 2015, the Boston Foundation launched the Campaign for Boston to strengthen the Permanent Fund for Boston, the only endowment fund focused on the most pressing needs of Greater Boston. The Foundation is proud to be a partner in philanthropy, with more than 1,000 separate charitable funds established by donors either for the general benefit of the community or for special purposes. The Boston Foundation also serves as a major civic leader, think tank and advocacy organization, commissioning research into the most critical issues of our time and helping to shape public policy designed to advance opportunity for everyone in Greater Boston. The Philanthropic Initiative (TPI), an operating unit of the Foundation, designs and implements customized philanthropic strategies for families, foundations and corporations around the globe.

Our Mission

As Greater Boston’s community foundation since 1915, the Boston Foundation devotes its resources to building and sustaining a vital, prosperous city and region, where justice and opportunity are extended to everyone. It fulfills this mission in three principal ways:

1: Making grants to nonprofit organizations and designing special funding initiatives to address this community’s critical challenges;
2: Working in partnership with donors to achieve high-impact philanthropy; and
3: Serving as a civic hub and center of information, where ideas are shared, levers for change are identified, and common agendas for the future are developed.

Values Statement

In everything we do, we seek to broaden participation, foster collaboration and heal racial, ethnic and community divisions.
The Boston Foundation’s Centennial By the Numbers

1st Community foundation to receive a major bequest and make grants

116 Number of new nonprofits and great ideas for which the Boston Foundation was “There at the Beginning” with critical early funding

$1.6 Billion Total grants made since 1915

$1.1 Billion Total grants made since 2001 alone

$192 Million Dollars raised for the Foundation’s endowment, the Permanent Fund for Boston, during 2015

$15 Million In outright gifts of $1 million each from generous Boston philanthropists to the Permanent Fund for Boston during 2015

3,900 People who attended Centennial events in 2015

$1 Million Raised by the 100th Anniversary Gala Dinner to benefit the Permanent Fund for Boston and community grant making
Letter from the Chair

As one who has had the privilege of serving as Chair of the Board of Directors of the Boston Foundation since 2009, I cannot help but be impressed by both the breadth and the depth of the Foundation’s impact on our community. That impact has never been as evident as it was in 2015, when the Foundation’s work over the course of the last century was acknowledged and celebrated during our Centennial.

This is my last letter as Chair of the Board of Directors of the Boston Foundation, and I want to begin by thanking the dedicated and talented members of the Board, especially Catherine D’Amato, who served as Vice Chair during most of my tenure, and Paul La Camera, who succeeded her in that role.

I won’t single out others because, to a person, they are deeply dedicated to guiding this institution in all of its multifaceted roles in the community—as grant maker, civic leader and a partner with donors.

I want to acknowledge—and thank—our excellent staff for guiding us through an outstanding Centennial year. And I particularly want to thank Paul Grogan for his groundbreaking leadership over the last 15 years. By expanding the work of the Boston Foundation to include civic leadership, he not only has transformed the role that philanthropy can play in our city, he has made the Boston Foundation a leader among community foundations nationally.

I also want to thank Mary Jo Meisner for her tremendous contributions to the Foundation’s civic leadership work over the last 15 years and for leading the remarkable celebration of the Foundation’s Centennial.

I am deeply grateful to the Boston Foundation’s donors who so generously contribute to our annual drive for the Civic Leadership Fund and all who have established Donor Advised Funds at the Boston Foundation. Choosing to conduct your philanthropy through Greater Boston’s community foundation strengthens the entire organization.

Finally, I want to pay tribute to those generous philanthropists who helped us launch the Campaign for Boston, designed to strengthen our endowment, the Permanent Fund for Boston, which provides the flexible funds that support everything the Foundation does in Greater Boston.

As a special Centennial drive, we had the goal of raising $10 million in outright gifts from Boston’s leading philanthropists. We received $15 million. We had an overall goal of raising $100 million in both outright and legacy gifts during 2015 and we raised almost twice that amount.

That campaign continues because building the Permanent Fund for Boston strengthens the future of this important organization.

In my first letter as Chair, I wrote that I considered the Boston Foundation to be nothing less than the social conscience of Greater Boston. I repeat that sentiment here. I have been honored to be a part of this important organization.

Michael B. Keating, Esq., Board Chair, The Boston Foundation
The year 2015 was a remarkable one for the Boston Foundation. We celebrated our 100th Anniversary and, in the process, learned a tremendous amount about our history and how it influenced, and was influenced by, the city we serve.

One factor made the Boston Foundation unique among all of the community foundations that were founded around the same time in other American cities. A man named James Longley, a mill owner and businessman, left a totally unrestricted bequest of $4 million to the Boston Foundation’s endowment, the Permanent Fund for Boston, just a year after the Foundation opened its doors. It was Longley’s entire fortune and today would be worth some $85 million.

His bequest gave the Foundation the capacity to be the first community foundation in the country to make grants.

That initial, incredibly generous bequest meant that, from its earliest days, the Boston Foundation had the flexible capital it needed to invest in Boston’s nonprofit sector. As the Permanent Fund for Boston grew, the Foundation’s leaders began to invest in new, untried ideas. Innovation became part of the Foundation’s DNA. Eventually, it had the resources to bet on more than 100 great ideas that worked. The entire list can be found in this Annual Report.

Many of the great ideas and nonprofit organizations the Foundation supported helped to create an urban renaissance for this city. And today, Boston is one of the most vital and dynamic cities—not only in the country, but in the world.

Now, however, is not a time for complacency. We have to be vigilant. We have to preserve the gains that have been won and we have to be smart and determined about taking on the next set of challenges. And they are daunting.

The opportunity gap. The lack of affordable housing. Too many schools that still don’t work. Too many people who can’t get a foot on the first rung of the ladder of opportunity. There’s plenty to do.

Our promise in this first year of our second century, is to bring all of our capacities to the task: the research we commission, the grants we make, the forums we host, the partnerships we have with donors, the public policy options we explore and support, the alliances we forge.

Together, let’s resolve to make Boston the opportunity capital of the nation, where upward mobility is not the exception, but the expectation.

I want to end this year’s report with a word about Mike Keating, who has served as the Chair of our Board of Directors since 2009 and ends his tenure this year. He has provided a steady hand at the helm and guided the Board with intelligence, commitment and kindness. He will be terribly missed by all of us, but we plan to continue to engage him in our work. We can’t afford to lose track of Mike Keating because he’s one of a kind.

Paul S. Grogan, President & CEO, The Boston Foundation

We have to preserve the gains that have been won and we have to be smart and determined about taking on the next set of challenges.
It was a year packed with small and large-scale events focused on the role the Boston Foundation has played in the past and on the most serious challenges facing our city in the future.

The Foundation began the year with a large conference that explored income inequality, climate change and infrastructure; went on to work closely with community groups to mount a joyous Centennial celebration in Boston neighborhoods—and capped the year with a 100th Anniversary Gala Dinner that raised $1 million for the Foundation’s endowment, the Permanent Fund for Boston. During 2014 and 2015, the Boston Foundation also held a series of Centennial Dinners—intimate gatherings focused on some of the most important issues facing Boston in the future. And in the spring of 2016, we honored our donors with “Philanthropy Matters,” a dinner and conversation with the distinguished surgeon and author Dr. Atul Gawande.

In addition, the Foundation published two Centennial books, launched a special Centennial website and unveiled new exhibits. And it launched the Campaign for Boston, which raised $192 million in 2015 alone for the Permanent Fund for Boston, the endowment which supports all of the Foundation’s work in Greater Boston.
MARCH 16
Centennial Dinner on Immigration Reform

APRIL 30
New Exhibits Installed
Including a history timeline, a “There at the Beginning” installation and interactive exhibits on the Foundation’s donors

MAY 13
Centennial Dinner on Housing and Community Development

JUNE 8
Centennial Dinner on Increasing K-12 Education Success

JUNE 23
Opportunity Forum
Our Kids: The American Dream in Crisis with author Robert Putnam

MAY 27
There at the Beginning Book Published
About how the Boston Foundation took a chance on more than 100 great ideas that worked

SEPTEMBER 21
Centennial Dinner on Higher Education

MAY 27
New Exhibits Installed
Including a history timeline, a “There at the Beginning” installation and interactive exhibits on the Foundation’s donors

JUNE 23
Opportunity Forum
Our Kids: The American Dream in Crisis with author Robert Putnam

SEPTEMBER 21
Centennial Dinner on Higher Education

MAY 27
There at the Beginning Book Published
About how the Boston Foundation took a chance on more than 100 great ideas that worked

JUNE 23
Opportunity Forum
Our Kids: The American Dream in Crisis with author Robert Putnam

SEPTEMBER 21
Centennial Dinner on Higher Education
SEPTEMBER 22
Opportunity Forum
On the Crucial Early Childhood Years

OCTOBER 23
Lighting the Line
Community Celebration
A “moving” neighborhood celebration on the Fairmount/Indigo Commuter Rail Line and a gift from the Foundation to the community of a lighting installation for Upham’s Corner

OCTOBER 28
Opportunity Forum
Educational and Skills Pathways to Economic Security

NOVEMBER 19
Centennial Dinner on Health and Health Care

NOVEMBER 19
Opportunity Forum
On Building the Infrastructure of Opportunity

DECEMBER 2
100th Anniversary Gala Dinner
More than 1,000 people experience a rousing program, and $1 million is raised for the Permanent Fund for Boston and community grant making
Since 1915, the Boston Foundation has served as the primary philanthropy for Greater Boston—from its earliest days of responding to the human needs of immigrants and the poor, to seeding innovation through “there at the beginning” grants for new nonprofits and fresh ideas, to helping change the very systems that affect the lives of everyone in our region.

For its first four decades, the Foundation responded to the dramatic events of the times, including two World Wars, the Spanish flu, the Great Depression and the polio epidemic. In 1960, it began funding new ideas and nonprofits in the context of the large social justice movements of the day, then went on to help Boston cope with the wrenching desegregation of its public schools in the 1970s.

In the 1980s and 1990s, the Foundation launched its own anti-poverty initiatives and changed the very structure of the organization to put it on firm footing for the future. And in 2001, it added civic leadership and policy work to its mission against the backdrop of 9/11, the Great Recession and the Boston Marathon bombings.

The following pages summarize the evolution of Greater Boston’s community foundation in the context of the historical events that have shaped and inspired its work over the last 100 years. For the full story, go to tbf100.org and read the Centennial book The Boston Foundation in the City of Ideas: 1915-2015.

“The Bird Feeder,” Boston Common, 1915, the year the Foundation was founded.
Responding to Need

In 1915, on the brink of America’s involvement in World War I, Greater Boston’s community foundation was founded by a father and son—Charles E. and Charles M. Rogerson. The son became the first director and would continue in that role for the next 30 years. In 1917, an industrialist named James Longley left $4 million to the Foundation, giving it the resources to be the first community foundation in the country to make grants.

For the next four decades, the Foundation shaped the future of philanthropy in Boston, responding to the needs of immigrants and laborers living in overcrowded tenements and struggling to build decent lives. Grants went to settlement houses, hospitals and organizations representing the rights of women and people of color. Funding also helped to ease hardship during two World Wars, the Great Depression and the polio epidemic of the 1950s.

The Foundation funded all of the hospitals and settlement houses that served the needs of thousands of immigrants pouring into Boston from Southern and Eastern Europe.
During the Great Depression virtually all funding went to direct relief, as close to one-third of Bostonians lost their jobs and families struggled to survive.
In the 1950s, the Foundation responded to the devastating polio epidemic and funded youth programs to counter the problem of juvenile delinquency.

World War II brought jobs to Bostonians, including women, and led to the Foundation’s first support of child care for the children of working women.
Seeding Innovation

In 1959, a major bequest of close to $20 million from a mysterious financier named Albert Stone gave the Boston Foundation the resources it needed to hire its first full-time director, Bill Bender, who began making visionary seed grants to a host of new nonprofits and great ideas.

The Foundation went on to have a profound impact on affordable housing, community health, public education and the arts in Boston. Eventually, it would be “there at the beginning” for more than 100 great ideas and new nonprofits—from WGBH to Brigham and Women’s Hospital to the cleanup of Boston Harbor.

In 1985, Anna Faith Jones became the first African-American woman to lead a major community foundation. During her tenure, the Foundation focused on inner-city poverty, strengthened relationships with donors and transformed the structure of the organization so that it could invest its own funds and have a diverse and active board. 

In the early 1960s, the Foundation funded Operation Exodus, which bused African-American children from Roxbury and Dorchester to better schools in other neighborhoods.
Boston Foundation director Geno Ballotti played a seminal role in the cleanup of Boston Harbor by funding Conservation Law Foundation and Save the Harbor/Save the Bay.

In the 1980s, the Foundation involved the business community in the Boston Public Schools through support for the Boston Compact and the Boston Plan for Excellence.
Poverty, especially among African Americans and Latinos, was a major focus of the Foundation’s research and funding.

Community organizing, especially among immigrants and refugees, was supported by the Foundation in the 1990s.
n 2001, in the midst of a “Boston Renaissance,” Paul S. Grogan was appointed President and CEO with a mandate to transform the Boston Foundation into a major civic leader. Within one year, the Foundation began conducting and publishing research on important issues, holding public forums attended by hundreds of people, convening diverse task forces and coalitions—and engaging in deep policy work. The Boston Indicators Project grounded the civic leadership work in data and published provocative and informative biennial reports, while creating an award-winning website.

Significant accomplishments have included historic K-12 education reform legislation, municipal health care reform, millions of dollars for the state’s cultural facilities, community college reform, a coalition promoting health and wellness—and the leveraging of major federal funds for a unique college completion initiative called Success Boston. Through its grant making, the Foundation continued to respond to the needs of the people of Boston and seed innovation.
The Foundation became a center for leading-edge research, a major convener and a force for enlightened public policy in housing, education, cultural facilities and municipal health.

Groundbreaking education reform legislation was signed by Governor Deval Patrick in 2010, raising the cap on charter schools and bringing $250 million in Race to the Top funding to Massachusetts.
More than half of Boston’s residents are people of color and the focus is on educating children and adults for a world dominated by technological innovation and communication.

Higher education also benefited from the Foundation’s leadership, with community college reform and Success Boston, a major initiative to help Boston’s students complete college.
The Permanent Fund for Boston, the Boston Foundation’s endowment, has been the sole resource for the numerous times the Boston Foundation has been “there at the beginning,” providing seed capital and early grants to more than 100 new nonprofits, ideas and innovations in all areas of community life. In some cases, the Foundation helped to launch these endeavors and provided key leadership. Beyond offering crucial financial resources, the Foundation’s support telegraphed optimism about the future of our city.

There at the Beginning
Fueled by the Permanent Fund for Boston

Achievement Network
Action for Boston Community Development
American Repertory Theater
Arts & Business Council of Greater Boston
ArtsBoston
The BASE
BATEC
BELL
Bessie Tartt Wilson Initiative for Children
Bornstein & Pearl Food Production Center
Boston After School & Beyond
Boston AIDS Consortium
Boston Center for the Arts
Boston Children’s Chorus
Boston Community Capital
Boston Compact
Boston GreenSpace Alliance
Boston Harbor Cleanup
Boston Indicators Project
Boston Landmarks Orchestra
Boston Nature Center
Boston Opportunity Agenda
Boston Schoolyard Initiative
Boston STRIVE
Boston TenPoint Coalition
Boston Urban Asthma Coalition
Boys & Girls Clubs of Boston
BPE (Boston Plan for Excellence)
Breakthrough Greater Boston
Bridge Over Troubled Waters
Brigham and Women’s Hospital
Calderwood Pavilion at the BCA
Carol R. Goldberg Civic Engagement Initiative
Center for Teen Empowerment

Charles River Conservancy
Citizen Schools
Citizens’ Housing and Planning Association
City Year
Coalition FOR Community Colleges
Commonwealth Compact
Commonwealth Housing Task Force
CommonWealth Kitchen
Commonwealth Seminar
Commonwealth Shakespeare Company
Commonwealth Summit
Community Builders
Community Health Centers
Community Music Center of Boston
EdVestors
English for New Bostonians
Fairmount/Indigo Line CDC Collaborative
Family Independence Initiative
Faneuil Hall Marketplace
Greater Boston Food Bank
Greater Boston Interfaith Organization
GreenLight Fund
Health Care for All
Health Leads
Healthy People/Healthy Economy Initiative
Home Funders
Hyde Square Task Force
Initiative for a Competitive Inner City
Inquilinos Boricuas en Acción (IBA)
Institute for Nonprofit Management and Leadership
John LaWare Leadership Forum
LISC Boston
Mass in Motion
Massachusetts Advocates for Children

WGBH-TV
Julia Child’s series

Julia Child’s series
At the heart of everything the Boston Foundation has done over the last century—every grant it has made, every innovation it has supported, every cause it has championed—is its endowment, the Permanent Fund for Boston.

Established through bequests left by hundreds of visionary and forward-thinking Bostonians, this essential fund fuels all of the Foundation’s work in Greater Boston and provides the resources that have sparked positive change and enabled new ideas over the last 100 years.

The ongoing Campaign for Boston was inspired by the Foundation’s 100th Anniversary and is designed to strengthen this crucial fund for today and for the future. During the Foundation’s Centennial year, 2015, the Foundation raised $192 million, almost twice the original goal of $100 million.

About the Permanent Fund for Boston

The Permanent Fund for Boston provides an ongoing source of funding for organizations focused on the most pressing contemporary needs of the city and the region. Today, it represents about one-third of the Foundation’s $1 billion in assets.

Funds raised in 2015 include $15 million in outright leadership gifts of $1 million or more from Centennial Circle donors. In addition, Centennial Society donors confirmed legacy commitments of $1 million or more to the Permanent Fund for Boston. Many of the remaining donations consist of planned gifts, mainly in the form of bequests, to be realized over time.

A full list of Centennial Circle and Centennial Society members is on page 27.

The Boston Children’s Chorus, for which the Boston Foundation was “there at the beginning,” sang at the Gala.
Over the last 100 years, more than 1,000 individuals, families and businesses have strengthened the Greater Boston community immeasurably by establishing and contributing to funds at the Boston Foundation—and thousands more have made contributions to funds held by the Foundation. Today, the Boston Foundation works closely with our donors, helping them to achieve high impact philanthropy and take advantage of planned and legacy giving opportunities to benefit the future of our community. The following pages list the members of our Legacy Societies and all of the funds that are held by the Foundation. Each fund has its own name, but all of them gain strength from being managed and invested together—and all of them contribute to strengthening Greater Boston's community foundation for today and the future.
Legacy Societies

Members of the Boston Foundation’s Legacy Societies are deeply committed to providing the Boston Foundation with the resources it will need today and in the future to meet the ever-changing needs and opportunities of our community.

Centennial Society

As part of the Campaign for Boston, the following donors have confirmed legacy commitments of $1 million or more to strengthen the Permanent Fund for Boston and benefit community grant making. We are deeply grateful to them for their generosity and for their commitment to our community. We thank and honor them here.

Anonymous (4)  
Diane DeSerras Arenella  
James F. Becker and Randal D. Rucker  
Rick and Nonnie Burnes  
Belden, Pamela, and Andrew Daniels  
Richard and Marcia DeWolfe  
Michael and Barbara Eisenson  
David J. Elliott and Hungwah Yu  
Grace and Edward Fey  
Lawrence and Atsuko Fish  
Peni Garber  
Brian Hyde  
Jane Wegscheider Hyman, PhD  
Louis and Marcia Kamentsky  
Bill Nigreen and Kathleen McDermott  
Robert A. and Veronica S. Petersen  
Sam Plimpton and Wendy Shattuck  
Joseph G. Prone Foundation  
Lindsey A. Rosen  
Sandra M. Stark

Centennial Circle

We are deeply grateful to the following donors who made outright gifts of $1 million or more to the Permanent Fund for Boston as part of our Campaign for Boston. These generous philanthropists are providing immediate resources to strengthen the Permanent Fund for Boston and community grant making. We thank them for their generosity and honor them here.

Anonymous (2)  
Charles Ansbacher Foundation  
Joseph E. Corcoran  
Gururaj and Jaishree Deshpande  
Sandra and Paul Edgerley  
Lawrence and Atsuko Fish  
Patricia and Paul Gannon  
Barbara and Amos Hostetter  
Jacobson Family Foundation  
Robert K. Kraft and Family  
Robert A. and Veronica S. Petersen  
Stephanie and Brian Spector

Above from top: Jaishree and Desh Deshpande and Joseph E. Corcoran are members of the Centennial Circle.
James Longley, born in Boston’s West End in 1840, became a director of major financial institutions in Boston and Chicago and owner of some of the largest textile mills in New England. Known for his deep devotion to Boston, when he died in 1916, he left the first major bequest to the Permanent Fund for Boston at the Boston Foundation. At $4 million, his gift was so large that it made Greater Boston’s community foundation the first in the country with the capacity to make grants.

Charles M. Rogerson was just a twenty-eight year-old attorney when he and his father, Charles E. Rogerson, founded the Boston Foundation. He drew up the legal papers that were signed on September 7, 1915, and served as the Foundation’s part-time director for close to thirty years—through two World Wars and the Great Depression. Since the community foundation movement was in its infancy at the time, Rogerson created all of the systems for the Foundation’s grant making, with no precedents to guide his work.

Longley Legacy Society
The Boston Foundation thanks these generous donors who have confirmed legacy commitments up to $1 million to our endowment, the Permanent Fund for Boston.

Anonymous (9)
Howard and Carol Anderson
Dorothy and David, Jr.* Arnold
Hanna and James Bartlett
Barry Bluestone and Mary Ellen Colten
Janine Bouchard
Margaret A. Bush
Barry B. Corden
Constance and Lewis Counts
Ralph J. Donofrio
Catherine Axon and Thomas M. Elder
Ellen Epstein and Rose and Lee Epstein
Patricia and Paul Gannon
Paul S. Grogan
Kate R. Guedj
Dean T. Hara and Congressman Gerry E. Studds*
Ann S. Higgins
Helen M. Jones
Jonathan and Judy Keyes
Anne F. Kilguss
Vera Kilstein
Carol F. Levin
Bernadette M. MacPherson
Barbara and Myron* Markell
Rabbi Bernard H. Mehlman
Timothy and Deborah Moore
Herbert E. Morse and Ellen Joy Fields
Katharine S. Nash
Beatrice and Peter Nessen
Ruben D. Orduña
Jennifer Jossie Owens
Nathaniel Pulsifer
Gary and Natalie Robinson
Anthony Mitchell Sammarco
Wendy C. Sanford
Daniel and Jennifer Sherman
Charles and Deana Shirley
Binkley and Paula Shorts
Scott E. Squillace, Esq.
Charles A. Walsh, III
Ann and Hans Ziegler

*Deceased
Anonymous (19)
Mary Lee T. and Peter C. Aldrich
G. Thomas and Allison Aley
Geoffrey D. Austrian
Theodore S. Bacon, Jr.
Sherwood E. Bain
Mary Barber
Rich Becker
Laurie A. Bencal, CPA
Doreen B. Biebusch
Thomas W. Bird
David Blot
Kenneth S. Brock
Jacob F. and Barbara C. Brown
Rick and Nonnie Burnes
Margaret A. Bush
Frank and Ruth Butler
David and Gay Campbell
Robert B. Canterbury
Helen T.W. Chen and
Keith R. Ohmart
Edward A. and Penny Cherubino
Arthur D. Clarke and Susan P. Sloan
Margaret J. Clowes
Frances F. Connelly
Diane Currie
Marilyn Darling
David S. and Shirley G. Dayton
Ralph J. Donofrio
Malcolm Dunkley
Anita Maria Elliott
Amy Zell Ellsworth
Ellen Epstein and Rose and
Lee Epstein
June M. Ficker
Sandra and Philip* Gordon
Andrew C. Goresh
Dr. G. Anne Guenzel
Charlotte I. Hall
Mrs. Chester Hamilton
Dean T. Hara and Congressman
Gerry E. Studds*
Marilyn L. Harris
Barbara Hauter Woodward
Petie Hilsinger
Kenneth D. and Cynthia L.
Holberger
Chuck Holland
Helen R. Homans
Emily C. Hood
Marjorie Howard-Jones
Muriel Hurovitz
Stephen G. and Rosemarie
Torres Johnson
Karen A. Joyce and John Fitzgerald
Ruth G. Kahn
Louis and Marcia Kamentsky
Gary P. Kearney, M.D. and
Susan Kearney
James A. Kilmurray and
Janice L. Quiram
Barbara N. Kravitz
Virginia Kropas
Peter and Stephanie Kurzina
Frances J. Lee-Vandell
John H. Livens
Donald J. and Susan Kelley
MacDonald
Robert and Poppy Mastrovita
Stephen J. McCarthy
Edward J. and Jane S. Michon
Charles Fessenden Morse
Frederick W. Neinas, MD
Carl H. Novotny and
Rev. Judith Swahnberg
Mark A. and Judith A. Osborne
Douglas D. and Geraldine Payne
Nancy E. Peace
Robert A. and Veronica S. Petersen
Agatha W. Poor
Glendora M. Putnam
Warren Radtke and
Judith Lockhart Radtke
Chris Remmes
Richard L. Robbins
Eleanor L. Ross
Edith M. Routier
John A. Russell
Beverly H. Ryburn
Wendy C. Sanford
Margaret Schmidt and
Kenneth Danila
Norman J. and Maryellen Sullivan
Shachoy
Annabelle W. Shepherd
Binkley and Paula Shorts
Ellen L. Simons
Edward G. (Ted) and
Nancy L. Smethurst
Cheryl H. Smith
Scott E. Squillace, Esq.
David F. and Patricia R. Squire
Arthur L. Stevenson
Anne B. Stone
Elihu and Bonnie Stone
Anne Thompson
Libby and Sidney Topol
Alan and Pamela Trefler
David F. Tuttle, Jr.
Joy E. Van Buskirk
Peter S. and Pamela L. Voss
Robert R. Wadsworth and
Catherine E. Moritz
J. H. Walton, Jr. and Carolyn Walton
Gordon Weil, Jr.*
Charles and Patricia Westwater
Constance V. R. White
Eric S. and Linda H. White
Jeffrey and Theresa Whitehead
Inge J. Wetzstein
Michael N. and Mary M. Wood
Eleanor D. Young

*Deceased
The Permanent Fund for Boston

The Permanent Fund for Boston is the Boston Foundation’s endowment and the most flexible fund we have, giving our staff and board members the crucial resources they need to respond to the most pressing issues facing contemporary Greater Boston. Many donors have contributed to this fund since the Foundation was first established more than 100 years ago. In honor of our Centennial in 2015, the Boston Foundation launched the Campaign for Boston to strengthen this important fund, which supports grants in education, health & wellness, jobs & economic development, neighborhoods & housing and arts & culture—all areas that have a profound impact on the quality of life in Greater Boston.

Unrestricted Named Funds

The following funds allow the Boston Foundation’s staff and board total flexibility in determining where they will have the greatest impact on the community. The year each fund was established is in the parentheses.

Irene W. Bancroft Fund (1997)
Harriett M. Bartlett Fund (1987)
J. E. Adrien Blais Fund I (1967)
James Dean Fund (1946)
Katherine E. Dooley Fund (1997)
Herbert and Lucy Fields Fund (2008)
Edward Glines Fund (1938)
Nathaniel Hooper Fund (1938)
Grace A. Jacobs Fund (1988)
Polaroid Fund (1997)
Ruth M. Reiss Memorial Fund (1997)
Walter J. & Marjorie B. Salmon Fund (1999)
Field of Interest Funds

These funds are directed to a particular issue or area of concern. Many were established by families or organizations wanting to honor loved ones or colleagues by naming a fund after them. The year each fund was established is in parentheses. New funds are bolded and italicized.

Solomon Agoos Fund (1987)
Anonymous Fund (1987)
Arts Fund (1997)
   Edith Allanbrook Fund (2002)
   Free for All Fund (2014)
   Edward Hyde Cox Fund (2000)
   Anna Faith Jones Arts Fund (2000)
   Brother Thomas Fund (2007)
   Brooks White, Jr. Memorial Fund (2001)
Edith M. Ashley Fund (1960)
Diane Heath Beever Memorial Fund (2008)
J. E. Adrien Blais Fund II (1967)
J. E. Adrien Blais Fund III (1967)
Emily Budd Fund (1960)
Community Organizing & Advocacy Endowment Fund (1988)
Community Safety Fund (2002)
Coolidge Christian Education Fund (1993)
David W. Cushing Fund (1987)
Mabel Walsh Danforth Fund (1949)
Virginia Herrick Deknatel Fund for Children’s Services (2001)
Annie S. Dillaway Fund (1965)
Kate Ellis Fund (1953)
Equality Fund (2011)
Mary C. Farr Arts Fund (2005)
Frederika Home Fund (1979)
Fund for Self-Reliance (1989)
General Support Fund for Education (1988)
Elizabeth D. Goldsmith Fund for Families (2010)
The Haiti Fund (2010)
Charles W. Hapgood Trust Fund (1986)
Harcourt Family Fund (2001)
Mary Harris Fund (1940)
Grace L. Holland Fund (2007)
Theodore C. Hollander Trust Fund (1929)

Fanny Wharton was the daughter of Salem merchant William Pickman, who created the Fanny Wharton Helping Fund in her memory when she died in 1880. The Fund was for the “relief of sick young women and children” and administered by family members for many years. In 1919, it was given to the Boston Foundation by Fanny’s husband, William F. Wharton, a Boston lawyer and Assistant Secretary of State under Benjamin Harrison. The purpose of the fund remains focused on the health of women and children.
Jamaica Plain Dispensary Fund (1962)
Charles Frederick Joy and Dora Marie Joy Fund (1992)
**Kraft Family Non-Profit Emergency Fund** (2015)
Edith Shedd Larsen Fund (1962)
Latino Legacy Fund (2012)
Maude A. MacNaught Fund (1979)
Azad & Doris Maranjian Charitable Trust Fund (2009)
Massachusetts Civic League Fund (1983)
Willis Munro Fund (1989)
Harry L. Nason Fund (1953)
Florence Arnaud Newton Fund (1955)
Grace G. North Fund (1954)
Norman Everett Pearl Fund (1996)
Janet S. & George T.B. Perkins Fund (2000)
**Petersen Family Fund for the Environment** (2015)
David R. Pokross Fund for Children in Need (1996)
Alice F. Rosenquist Fund (1984)
Louis Agassiz Shaw Fund (1991)
Katherine Dexter Shelman Fund (1954)
Sophia Snow Fund (1948)
Helen & Marion Storr Fund (1986)
Stuart-Jones Trust Fund of the All Souls Lend A Hand Club, Inc. (1994)
Carroll J. Swan Memorial Fund for Children’s Charities (1935)
Nelson E. Weeks Fund (1937)
Fanny Wharton Fund (1919)
Katherine C. Wheeler Fund (1987)
Fund for Preservation of Wildlife & Natural Areas (1994)
Herbert Farnsworth Fund (1994)
Hollis D. Leverett Memorial Fund (1994)
Arthur L. Williston and Irene S. Williston Trust For Education (1953)
Mary Denny Williston Fund (1969)
Window Shop Fund (1988)
Gladys W. Yetton Fund (1969)

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**Gifts to the Permanent Fund for Boston**

The following lists include donors who have made gifts totalling more than $5,000 to this fund, with the year of their first contribution noted in parentheses. Donors with new gifts are bolded and italicized.

**Gifts from Individuals, Corporations and Foundations**

Mr. and Mrs. Peter Brooke (1994)
*The Boston Company* (1991)
Brother Thomas Charitable Foundation (2007)
Peggy A. Brown (2008)
Henry Burkhardt, III (1986)
*Catherine and Paul Buttenwieser Foundation* (1998)
Linda Cabot Black Foundation (2005)
Dorothy Jordan Chadwick Fund (2002)
Chester County Community Foundation, Inc. (2007)
Combined Jewish Philanthropies of Greater Boston, Inc. (2007)
Commonwealth of Massachusetts (2009)
Michael F. Cronin (2004)
Lawrence and Susan Daniels Family Foundation (2003)
Dusky Foundation (2013)
Eastern Bank Charitable Fund (2014)
Virginia Ellis Memorial Fund (1976)
Leon R. Eyges Memorial Fund (1963)
George R. Farnum (1982)
Martha M. Fosdick Fund (1978)
**Lucille Francis** (2014)
MFS Investment Management (2014)
**Gonzalez Saggio & Harlan LLP** (2014)
Grand Bostonians Dinner (1984)
Anne C. Gray (2010)
John Hancock Life Insurance Company (2014)
Mrs. Jean Hanlon (1991)
Haymarket People’s Fund (1994)
HBB Foundation (1995)
Katherine B. Hood (2000)
Donald J. Hurley Memorial Fund (1978)
Jane W. Hyman (2002)
Institute for Affirmative Action (2007)
**Greg and Maria Jobin-Leeds** (2014)

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Stephen P. Jonas (2007)
Ross Jones and Emily Nielsen Jones (2015)
John S. and James L. Knight Foundation (2009)
Dr. & Mrs. Arthur R. Kravitz (1987)
George and Ellen Lovejoy (2015)
Mr. and Mrs. Gael Mahony (1982)
Reiner Moquete (2013)
Wilbert G. and Eunice Muttart Foundation (2007)
Northern Trust (2005)
The Overbrook Foundation (1991)
Partners HealthCare System, Inc. (2013)
Phillip Perelmutter (2013)
Philanthropic Collaborative, Inc. (2005)
David R. Pokross, Jr. (1996)
William J. and Lia G. Poorvu (1996)
Harry & Minnie Rodwin Memorial Fund (1975)
Pamela M. Smith (2006)
Dr. W. Davies Sohier, Jr. (1990)
Mrs. Helen Spaulding (1992)
Starr Foundation (2005)
Matthew J. & Gilda F. Strazzula Foundation (2000)
Gertrude T. Taft (1956)
Tech/Ops, Inc. (1982)
United Asset Management Corporation (1994)
Herb and Charlotte Wagner (2014)
H. Reed Witherby and Ivers Bever (1994)
Ms. Hungwah Yu and Mr. David J. Elliott (2002)
Albert and Judith Zabin (2008)

**Gifts from Estates**

Alice A. Abbott (1967)
Emily T. Allen (2006)
Matilda S. Alley (1964)
Miriam S. Alley (1965)
Margaret Sears Atwood (1970)
Margaret E. Babcock (1973)
Annie O. Baldwin (1953)
Wilbert S. Bartlett (1969)
George P. Beech (2009)
Reginald Benting (1984)
William L. Birely (1959)
Edmund Bridge (1933)
Frederick W. Bridge (1942)
Jesse F. Burton (1971)
Susan Cabot (1947)
Charles T. Carruth (1983)
Gladys Chiquoine (1983)

Helen A. Clafin (1992)
Winifred I. Clapp (1990)
Horace W. Cole (1992)
Anastasia Conte (1988)
Arthur S. Cummings (1943)
Charlotte E. H. Curtis (1940)
Maria Corinne Dana (1963)
Luisita L. Denghausen (1990)
Kenneth S. Domett (1960)
Mary Frances Drown (1929)
George H. Eastman (1971)
Mary Farr (2006)
Lucy Fields (2008)
Benjamin Fisher (1996)
Edith R. Fottler (1948)
Alma L. Frost (1948)
Anna C. Frothingham (1941)
Forrest C. Gates (1970)
Mary M. Geist (1982)
Pauline S. Gerneshhausen (2006)
Anne C. Gray (2010)
Donald Gregg (1963)
Patricia Grisham (1964)
Joseph Guild (1964)
John Hagopian (2002)
Ellen Page Hall (1931)
Dorothy C. Harris (1967)
Elizabeth M. Hay (1972)
Fred R. Hayward (1969)
Elizabeth D. Herteli Trust (2005)
Vladimir H. Herteli Trust (2005)
Anna P. Hills (1969)
Harry Holland (2007)
Agnes G. Homes (1961)
Adeline D. Hooper (1973)
Mary Frothingham Hooper (1961)
Elizabeth B. Hough (2002)
Elizabeth B. Hurley (2000)
Frances A. Jordan (1978)
Paul Kimball (1964)
James G. Knowles (1982)
Ida Fales Lamb (1967)
James Longley (1918)
Clara N. Marshall (1943)
Arthur W. Moors (1950)
John Wells Morss (1940)
John Adams Paine (1967)
Winthrop D. Parker (1967)

George H. Eastman was born in 1881 in Boston and graduated from English High School and Harvard College. He was a successful insurance broker who made a fortune through wise investments. When he died in 1970 at the age of 89, he left a major bequest to the Permanent Fund for Boston, writing, “After I’m gone, I must rely on the good judgment of others for any good I might be able to do.”
Annie S. Penfield (1979)
Blanche E. Philbrick
(Merchant E. Philbrick Fund) (1965)
Mary N. Phillips (1974)
J. Christie Pingree (1957)
Carrietta W. Proverbs (1984)
Bertha J. Richardson (1975)
Frank L. Richardson (1975)
Mabel Louise Riley in memory of
Charles Edward (1972)
Riley and Agnes Winslow Riley (1972)
Jordan S. Ruboy, M.D. (2011)
Helen S. Sharp (1966)
Frank R. Shepard (1954)
Anne G. Shewell (1984)
Alice Wilder Smith in memory of Frank Langdon Smith (1968)
Eleanor Smith (1986)
Pamela M. Smith (2008)
Francis M. Stanwood (1961)
Albert J. Stone, Jr. (1960)
Mary P. Stone (1948)
Lenna R. Townsend (1952)
Willis S. Vincent (1940)
Clarice M. Wagner (1993)
John M. Ward (1927)
Madeline Cobb Webber (1973)
Louise M. Weeks (1944)
Arthur W. Wheelwright (1963)
Estate of Stetson Whitcher (2008)
Joseph A. White (1979)
Edward E. Williams (1950)
Lizzie A. Williams (1951)
Albert and Judith Zabin (2007)

**Gifts from Trusts**

Margaret Shaw Allen Trust (1982)
James R. Bancroft Trust (1983)
Helen C. Barker Trust (1990)
Nancy Beals Trust U/W (1984)
Diane Beever Charitable Remainder Unitrust (2008)
Reginald Benting Charitable Remainder Unitrust (2009)
Nelson Bigelow Trust (1990)
Mabel M. Brown Trust (1991)
Ellen E. Carroll Trust U/W (1979)
Anne H. Davis Trust U/Ind (1964)
Gladys Dean Trust U/Dec (Laurence Guild Dean Fund) (1977)
Paul Elliott Trust U/Agreement (1991)
Ruth S. Frake Trust Bequest (1981)
Donald Gregg Subtrust (2008)
Charles Hapgood Trust (2009)
Carrie A. Hartley Trust U/Ind (1963)
Helen P. Hennessey Trust (1984)
Ada H. and Clara Hersey Trust U/Ind (1955)
Vladimir N. Herteli Trust (2003)
George L. Hill Trust (2002)
Frances C. Huvos 1983 Trust (2011)
Mark Hyman, Jr. Insurance Trust (1999)
Cyril H. Jones Trust U/Ind (1974)
Pauline Kleven 1988 Trust (1990)
Aimee Lamb Trust U/Ind in memory of Winthrop and Aimee
Sargent (1980)
Lambert Marital Trust (2006)
Barbara Estabrook Livermore Trust (1982)
Cora E. MacKenzie Trust U/Ind (Cora E. MacKenzie Fund) (1973)
Mason Charitable Remainder Annuity Trust (2005)
Adelaide Sargent Mason Trust (1982)
Phyllis McGillicuddy Trust (1993)
Ethel Fay McGuire Trust U/Ind (1973)
David D. Moir Revocable Trust (1992)
Gertrude Morrison Trust U/Ind (1965)
Robert O. Preyer Charitable Lead Unitrust (1992)
Esther Frances Quinn Trust (1995)
Harriet Rogers Unitrust (1990)
Florence M. Scott Trust U/W (1971)
George F. Shadwell Trust (1990)
J. de Vere Simmons Trust (1985)
Edson B. Smith Trust U/A (1984)
Irene C. Smith Trust U/A (1975)
Florence Snelling Trust (2006)
The William D. Sohier Marital QTIP Trust (2014)
Spaulding-Potter Charitable Trusts (1972)
Margaret Castle Tozzer Trust U/Ind (1978)
Donors to the Civic Leadership Fund

This critical fund helps to fuel the Boston Foundation's highly effective formula for civic leadership, which includes: publishing cutting edge research; holding major forums and convenings; conducting strategic and proactive grant making; forming task forces and coalitions; using communications and the media—and advancing public policy. A number of areas of life in Greater Boston and throughout the Commonwealth have benefited tremendously from this work, including public education, college completion, community colleges, health and wellness, cultural facilities, smart growth housing, municipal finance and criminal justice. We thank all of this year’s generous donors.

GIFT AMOUNT

$100,000+
Anonymous
Jack and Elizabeth Meyer

$50,000-$99,999
Paul and Sandra Edgerley
Amalie Kass
Alan and Harriet Lewis

$25,000-$49,999
Abrams Foundation, Inc.
Josh and Anita Bekenstein
Michael and Barbara Eisenson
Paul and Phyllis Fireman
Phillip and Elizabeth Gross
Amos and Barbara Hostetter
Joanna and Jonathan Jacobson
John Hancock Life Insurance Company
The Robert & Myra Kraft Family Foundation, Inc.
Barbara Kravitz
Michael Krupka and Anne Kubik
George and Ellen Lovejoy
David and Louise Weinberg

$10,000-$24,999
Anonymous (5)
Walter and Alice Abrams
William Achtemeyer
Karen and Jim Ansara
Bank of America Charitable Foundation
Robert Beal
Thomas and Lisa Blumenthal
Michael and Lisa Bronner
Richard and Nonnie Burnes
Eileen and John M. Connors, Jr.
Joseph E. Corcoran
Jonathan and Margot Davis
Denham Capital Management
Gururaj and Jaishree Deshpande
John and Kathleen Drew
Eastern Bank Charitable Foundation
EOS Foundation
Grace and Edward Fey
Fiduciary Trust Company
Chris Gabrieli
Spencer Glendon and Lisa Tung
Robert and Diane Hildreth
Albert and Diane Kaneb
Stephen and Jill Karp
The Klarman Family Foundation
Charles and Susie Longfield
Carolyn and Peter Lynch
Martin and Tristine Mannion
William and Linda McQuillan
Jane Mendillo and Ralph Earle, III
Joseph and Katherine O’Donnell
Ronald O’Hanley
Partners HealthCare System, Inc.
Elizabeth and Robert Pozen
Prime, Buchholz and Associates, Inc.
Elizabeth Riley and Daniel Smith
David and Marie Louise Scudder

The Boston Foundation’s Civic Leadership Impact

BY THE NUMBERS
Over the last 15 years, with the support of hundreds of donors to the Civic Leadership Fund, the Boston Foundation’s civic leadership has had real impact.

Government Dollars Leveraged and Saved Through Civic Leadership and Public Policy Work

$599.4 MILLION

Number of Research Reports Published Since 2001, including 89 Understanding Boston Reports

115

Number of Public Forums including Understanding Boston Forums Since 2001

160

Number of People Who Attended Forums including Understanding Boston Forums Since 2001

32,400
Wendy Shattuck and Sam Plimpton
Binkley and Paula Shorts
Richard and Susan Smith
Family Foundation
Brian and Stephanie Spector
Arthur Winn

$5,000-$9,999
Anonymous (5)
Amy Anthony
Baupost Group, LLC
Beacon Capital Partners, LLC
Barry Bluestone
Citizens Bank
Brian and Karen Conway
Theodore Cutler
Richard and Marcia DeWolfe
Douglas and Susan Donahue
Steven Fischman
John and Cynthia Fish
Paul and Patricia Gannon
Robert and Linda Glassman
Carol and Avram Goldberg
Harvard Pilgrim Health Care
Hill Holiday
Joseph Hooley and Linda Spiro
Michael and Martha Keating
KPMG, LLP
James and Lois Lober
Linda Mason and Roger Brown
Massachusetts General Hospital
National Grid USA
Peter and Beatrice Nessen
Glenn and Faith Parker
Ellen Remmer and Chris Fox
John and Dorothy Remondi
Robert Reynolds
Rutabaga Capital Management
Robert and Jean Sheridan
The Sidman Family Foundation
John and Susan Simon
Raymond and Maria Stata
Michael and Nancy Tooke
Gregory Torres and Elizabeth Patulo
Tufts Health Plan Foundation, Inc.

$2,500-$4,999
Anonymous (3)
Allyn Foundation, Inc.
Bruce J. Anderson Foundation
William Barke
Roger Berkowitz
William Burgin
Jill Ker Conway and Mark Leahy
Michael and Linda Frieze
David and Anne Gergen
Gourmet Caterers
Anthony and Brenda Helies
Stephen and Cheryl Jonas
Brian and Susan Kavoogian
Shari and Robert Levitan
Richard and Nancy Lubin
McCall & Almy, Inc.
James and Maureen Mellowes
Gabrielle Miller
Lynn and Patricia Mormann
William and Brooke Muggia
Robert and Alison Murchison
Tami Nason and Kent Lage
Carl Novotny and Judith Swanberg
Jerry Rappaport, Jr. and
Lori Platt Rappaport
Donald Rodman
Rohda Family Charitable Foundation
William Schawbel and Judy Samuelson
Gardiner Howland Shaw Foundation
Greg and Michelle Shell
David and Stephanie Spina
James M. and Cathleen D. Stone
Frederic Wittmann and
Christine Kondoleon

$1,000-$2,499
Anonymous (8)
A.W. Perry, Inc.
W. Gerald Austen and Patricia Austen
Bank of New York Mellon
Mr. David I. Begelfer
Blue Cross Blue Shield
Joan Bok
Peter and Anne Brooke
Catherine and Paul Buttenwieser
Foundation
Thomas Butters
Appy and Susan Chandler
Gerald and Kate Chertavian
Ciccolo Family Foundation
Eugene and Meredith Clapp
Colliers International New England
Susana and Ferdinand Colloredo-Mansfeld
Constance and Lewis Counts
Stephen Crosby and Helen Strieder
Robert Crowe
John and Diddy Cullinane
Susan Culman
Curriculum Associates
J.H. Daingerfield and Constance Perry
Catherine D’Amato and Debbie Ford
Timothy and Maureen Dibble
Stephanie Dodson
Ronald Druker
William Edgerly
Lee Ellsworth and Amy Zell Ellsworth
Thomas Feeley
Tim and Corinne Ferguson
Laurel Friedman
Alan and Judy Fulkerson
M. Dozier Gardner
Roger Greene
Josh and Sarah Greenhill
Paul S. Grogan
Kate Guedj
H.N. Gorin, Inc.
John Hamill
Lucius and Wendy Hill
Thomas and Diane Hollister
Tom and Nancy Howley
Brian Hyde
Income Research & Management
Edmund and Margaret Ingalls
Isaacson Miller, Inc.
Jackie L. Jenkins-Scott and James M. Scott
Becky Kidder Smith and Thomas Smith
Peter C. Knight and Deborah Sanford
Knight
UP TO $25-$999
Anonymous (4)
Jon Abbott and Shari Malyn
Samuel Adams
Scott Bartley and Christopher Norris
William Baskett
Anthony and Jacqueline Baudanza
Kevin Bolduc
John and Jane Bradley
Meg Campbell
Cynthia Chace Macniel
Stephen Chan
Ann Crane
Joseph Cronin
Corey Davis
Geri Denterlein
Carmen Denyes
Gerry and Kathleen DeRoche
Lawrence S. DiCara
Robert Donnelly
Michael Douvadjian and Lynne Brainerd
Donna Driscoll
Shane Dunn
David and Marion Ellis
Ellen Epstein and Ian Brownell
Daniel Fleishman and Barbara Shapiro
Laurence Flood and Mary Tyler Knowles
Tom and Carla Fortmann
Fraser Project Management
Robert and Rochelle Friedman
Susan Friedman
Brendan Furey and Tara Henry
Timothy and Mary Anne Gassert
Laura Godine
Hillel Greenbaum
Gregory Groover, Sr.
Rev. Ray Hammond and Dr. Gloria White-Hammond
George and Daphne Hatsopoulos
Petie Hilsinger
Kenneth and Pamela Hurd
Charles and Charlene Hyle
Jamaica Plain Regan Youth League
Jeffrey and Susan Jones

Lawrence Jordan and Myechia Minter-Jordan
Martin and Wendy Kaplan
Jonathan and Judith Keyes
Garrett Larivee
Leading By Example
Mary Kay Leonard and Richard W. Valachovic
Martin Liebowitz and Mary M. Lassen
Elliott and Carole Mahler
Elizabeth March and David Stein
Mary Jo Meisner
Scot and Lorraine Miller
Neighborhood of Affordable Housing, Inc.
Bill Nigreen and Kathleen McDermott
Arthur and Judith Obermayer
Carol and Thomas O’Donnell
Pauline O’Leary and John Malarkey
Colette Phillips
Jeffrey Poulos
Hanson Reynolds and Sharon Gray
William G. Rogerson
Elizabeth Saltonstall
Helen Chin Schlichte
Daniel and Jennifer Sherman
Ellen Simons
Guido and Julie Smith-Bartoloni
Gail Snowden
William and Christine Speciale
United Parish in Brookline
Alfred and Marta Van Ranst
Stephanie and Alan Ward
Robert and Joan Weinstein
Christopher and Nancy Winship
Katherine Winter
Michael Yogman
Albert and Judith Zabin
The following is a list of all Donor Advised Funds established by individuals, families and businesses choosing to be actively involved in their charitable giving. We work closely with these donors to help them achieve high-impact giving. We thank them for choosing the Boston Foundation and for their commitment to philanthropy. The year the fund was established is listed in parentheses. New Donor Advised Funds are bolded and italicized.

- 3C Fund (2012)
- 63 Marlborough Street Fund (1984)
- AADS Memorial Fund (2004)
- Walter and Alice Abrams Family Fund (2005)
- Acacia Fund (2004)
- Adler Family Fund (2006)
- Adlib Foundation (2010)
- Aher-McCoy Charitable Fund (2014)
- James F. Alenson Memorial Fund (2007)
- Aley Fund (2009)
- Aliad Fund (1993)
- Dwight & Stella Allison Fund (1982)
- Alper Family Fund (1995)
- George and Nedd Anders Fund (1991)
- Barbara Jane Anderson Fund (2000)
- Selma and Bayness Andrews Fund (2006)
- Anony Fund (1998)
- Ansara Family Fund (2006)
- Anthropologists’ Fund for Urgent Anthropological Research (1996)
- APOC Fund (2011)
- Arba Lifnot Baker Fund (1992)
- Arch Stanton Charitable Fund (2013)
- Armony Erel Charitable Fund (2008)
- Atlantic Fund (1997)
- Victoria J. Avery Charitable Fund (2014)
- Susan M. Aygarn and Michael R. Aygarn Charitable Donation Fund (2012)
- Back Porch Fund (2014)
- Balzer/Bellinger Fund (2007)
- Hanna and James Bartlett Fund (2014)
- Baudanza Family Fund (1997)
- Beachcomber Fund (2008)
- Belinda Fund (2011)
- Benjamin Foundation (2005)
- Best Doctors Charitable Foundation (2010)
- Bird Fund (1999)
- Bill Bither Charitable Fund (2013)
- Emmanuel and Jane Blitz Fund (1992)
- Tom and Lisa Blumenthal Family Foundation (2005)
- Joan T. Bok Fund (1997)
- Bolze Family Fund (2013)
- Boston City Hospital Social Service Fund (1981)

The Black Philanthropy Fund was established as a Donor Advised Fund at the Boston Foundation in 2008 to further enhance a strong tradition of African-American philanthropy in Boston, with a focus on increasing the magnitude and effectiveness of giving to the black community. Recently, the Fund launched a program called Boston Basics with the Mayor’s Office of Education and Harvard University’s Achievement Gap Initiative. Boston Basics is a research-based framework that has the goal of dramatically increasing kindergarten readiness for children 0 to 3 in Boston.
Braverman Family Fund (1992)
Bride/McEnany Fund for Safer Women (2014)
Bronner Charitable Foundation (2006)
Peter A. Brooke Fund (1998)
Brooke Family Donor Advised Fund (2007)
Buckman Fund (2010)
Dean Bullock Family Fund (1997)
Bill and Barbara Burgess Fund (2002)
William T. Burgin Fund (2001)
John A. Butler Memorial Fund (1988)
Kairos Butler Fund (1994)
Butler’s Hole East (2011)
Butler’s Hole Fund (1994)
Butler’s Hole North (2011)
Butler’s Hole South (2011)
A. Bruce Campbell Fund (2002)
Krystle Campbell Memorial Fund (2013)
C. Alec and Sarah O’H. Casey Charitable Fund (1993)
Margaret W. Casey Fund (1986)
Alice F. Casey Fund (2006)
Ellen W. Casey Fund (1993)
Charlestown Benevolent Fund (2010)
Charlestown Fund (2008)
Chasin/Gilden Family Fund (2000)
Charles Ezekiel and Jane Garfield Cheever Funds I & II (2006)
Chelsea Community Fund (1997)
Joyce Chen and Helen Chen Foundation Fund (1995)
Chertavian Family Fund (2005)
Christ on Earth Fund (1989)
Michael W. Christian Memorial Fund (1986)
Dr. & Mrs. B.U. Chung Fund (1999)
Chung Family Fund (1999)
Churchill Family Fund (1997)
Circle Fund (1997)
Civic Engagement Fund (2010)
CJE Foundation Fund (2007)
Clark Family Fund (2010)
Clarke Fund (1987)
Clementine Fund (2014)
Coit Family Fund A (2001)
Colby Charitable Fund (1980)
Colony Road Fund (1997)
Condor Street Fund (1988)
Constance and Lewis Counts Fund (1990)
Coolidge Family Fund (1982)
Cooper Leeser Family Fund (1997)
Corvelli Fund (1996)
Jessie B. Cox CLT - Cox Family Fund (2009)
Crane Fund (2012)
Joseph Craven Family Fund (2014)
Cregan Charitable Fund (2005)
Crosby Family Fund (2000)
Kate Crozier Fund (2007)
Tarrant and Laura Cutler Charitable Gift Fund (2008)
Dainger Fund (1997)
Lawrence B. and Elisabeth T. Damon Charitable Fund (2013)
**Belden, Pamela and Andrew Daniels Opportunity Fund for Aspiring Boston Young People** (2014)
Darling Family Fund (1983)
John Da Silva Memorial Fund (1988)
Kimberly Dawson Charitable Fund (2012)
John H. Deknatel Family Fund (2009)
Sarah Derby and Gary MacDonald (2007)
Rebecca Derby and Evan Morton (2007)
DeWolfe Family Fund (2000)
Dibble Family Fund (2005)
Larry DiCara Fund (2006)
Dodson Family Charitable Fund (2007)
Doe Noordzij Fund (2001)
**Eric Dolinski & Kristen Ploetz Fund** (2015)
**Marthanne Dorminy Fund** (2015)
Drane Center Fund (2002)
Dryfoos Family Fund (2012)
William J. Ducas Charitable Fund (2011)
Margaret Eagle Foundation Fund (2000)
Ecclesia Mission Fund (2012)
Egozy Fund (2006)
Eisenson Family Fund (2005)
Elliott and Yu Education Fund (2012)
Ellis Family Fund (2003)
Elphaba Fund (2014)
**Elpus Family Fund (2015)**
Gerald Entine Family Trust Fund (2008)
Ethics Trust Fund (1993)
Evans Family Fund (1999)
Norris & Constance Evans Charitable Fund (1999)
The Ewing Family Fund (2014)
Peter and Ellen Fallon Fund (1997)
Steven D.H. Farrell Fund (2013)
Carol Fazio Charitable Fund (2010)
Fish Family Fund (2009)
Fishreys Family Philanthropic Fund (1999)
Flower Hill Fund (2012)
Foote-Richards Family Foundation (2013)
Forshey Family Fund (1997)
Free for All Concert Fund (2011)
Niki & Alan Friedberg Fund (1986)
David Frisbie Family Charitable Fund (2010)
Fulkerson Family Fund (1998)
Davis R. Fulkerson Fund (1999)
Lyle W. Fulkerson Fund (1999)
Fuller Trust, Inc. Fund (2009)
Future Fund (2006)
Gabrieli Family Fund (1997)
Gaffney / Kames Foundation Fund (1997)
Galilean Fund (2008)
Ganesh Fund (2001)
Dave Garroway Fund (1982)
Garuda Fund (2007)
Brad Gatlin Family Fund (1995)
Gaudette Family Fund (2000)
Gergen Family Fund (2009)
Congressman Gerry E. Studds Fund (2006)
Gilbert Fund (2007)
Ginsberg / Kaplan Fund (2011)
Giudice Family Fund (2011)
Glassman Gale Family Fund (1985)
John & Ethel Goldberg Fund II (1984)
Carol R. & Avram J. Goldberg Fund (1983)
Peter G. Gombosi Memorial Fund for Autism Research and Services (2005)
**The Goodman-Swindell Family Foundation (2015)**
Goodworks Fund (2002)
Gordon Educational Fund (2001)
Sandra & Philip Gordon Family Foundation Fund (2001)
Gordon Place Charitable Fund (2012)
Laurie Gould and Stephen Ansolabehere Fund (2009)
Gravelley Springs Fund (2005)
Green Fund (2011)
Greenhill Family Charitable Fund (2013)
Grogan Fund (2012)
Patricia H. Gross Fund (1999)
**Elizabeth and Phillip Gross Family Foundation (2014)**
Grunebaum Charitable Fund (2006)
Gualala Fund (1991)
Guenzel-Pieters Family Fund (2008)
Belle Linda Halpern Family Fund (2012)
Ken and Becky Hansberry Fund (2001)
**Swift Harvey Family Fund (2014)**
HEIRS Fund (1996)
**Helen C. Powell Donor Advised Fund (2015)**
Helies Family Fund (2000)
Elizabeth D. Heller Fund (1987)
Henderson Fund (1996)
Hewitt Family Charitable Trust Fund (1993)
Higgins Endowed Fund (2011)
Higgins Family Fund (2013)
Ann S. Higgins Fund (2001)
Hildreth Stewart Fund (2012)
Petie Hilsinger Fund (1999)
Hoffman Fund (1986)
Holberger Family Fund (1993)
Holland Family Fund (1993)  
Gilbert H. Hood Family Fund (1980)  
Emily C. Hood Fund (2011)  
Hourless Fund (1997)  
Hamblin L. Hovey Institute Fund (1983)  
Hoyt Family Fund (2000)  
Hunt Fund for Children (2001)  
Income Research and Management Charitable Fund (2013)  
Interstitial Fund (2009)  
J. Jill Compassion Fund (2002)  
JADELBEC Fund (2002)  
Hope and David Jeffrey Fund (2011)  
Jochkan Charitable Fund (2001)  
Jonas Family Fund (2000)  
Louis and Marcia Kamentsky Donor Advised Fund (2010)  
Beton M. Kaneb Fund (1983)  
Albert J. & Diane E. Kaneb Family Fund II (1997)  
Martin & Wendy Kaplan Fund (2006)  
Kassler Family Fund (2000)  
Keewaydin Fund (2001)  
Keogh Family Fund (2000)  
Kidder SBSM (Strong Body, Strong Mind) Fund (2005)  
Kindling Fund (2011)  
KJN Family Fund (1997)  
Kluchman Family Fund (1997)  
Allen and Elizabeth Kluchman Fund (1997)  
Klureza Family Fund (1997)  
Stephen P. Koster Fund (1985)  
Kravitz Family Fund (1993)  
Krivickas Family Fund (2006)  
Gregory and Deborah Latham Family Charitable Fund (2011)  
Jay R. and Carol B. LaMarche Family Charitable Trust (2012)  
LandWave Fund (2009)  
Lash Family Charitable Fund (2014)  
Lorin A. Lavidor and Eric E. Berman Charitable Fund (2005)  
Leading By Example Fund (2014)  
Paul and Mary Lee Fund (2013)  
Roger & Clarissa Lee Family Fund (2009)  
Thomas E. & Barbara B. Leggat Fund (1986)  
Jo-Ann and Martin Leinwand Fund (1986)  
Colman & Carol Levin Fund (2000)  
Levitt Family Fund (2000)  
Levy Family Fund (2014)  
Henry R. Lewis Family Fund (2007)  
Lissy Family Fund (2008)  
LMG Fund (1997)  
Marjorie L. and James M. Lober Fund (2010)  
LOC Fund (2009)  
Joan Locatelli Foley Memorial Fund D (1997)  
Longfield Family Foundation (2011)  
Loomis Sayles Charitable Fund (2007)  
Lord-Buck Fund (1996)  
Bruce Lunder Fund (1982)  
Donald J. & S. Kelley MacDonald Charitable Fund (1998)  
Magic Penny Fund (1997)  
Mahoney Family Fund (1983)  
Mann Family Fund (2010)  
Margolin/Rushford Charitable Fund (2014)  
Evelyn A. Marran Fund (1983)  
The Demond and Kia Martin Foundation (2014)  
Martin Fund (1998)  
Mason-Brown Fund (2008)  
Match School Scholarship Fund (2007)  
Joan S. Matthews Charitable Fund (2014)  
Eric and Sue May Charitable Fund (2012)  
Mayel Fund (1982)  
May- McClain Charitable Gift Fund (2012)  
Austin and Tiverton McClintock Gift Fund (2014)  
Alice L. McDougall Donor Advised Fund (2015)
Eleanor P. McIntyre Fund (2001)
McSweeney Family Charitable Fund (2009)
Medical Research Fund (1992)
Leila Yassa & David Mendels Fund (2000)
Thomas M. Menino Fund for Boston (2013)
Gilbert G. Menna Family Fund (1999)
Merritt’s Way Fund (2013)
Meyer Foundation (2006)
Allan Meyers Fund for the Advancement of Careers in Disability (2000)
Michon Family Fund (1986)
Microsoft Unlimited Potential Fund (2005)
Milford Street Fund (2014)
Anita L. Mishler Education Fund (1983)
Moccasin Brook Fund (2000)
The Modi Family Pass The Luck Foundation (2012)
Monadnock Fund (2002)
Mormann Family Fund (2006)
Andy Morris and Lynne Salkin Morris Family Fund (2011)
Sykes Moyer Fund (2005)
Muddy Pond Trust Fund (1994)
Munger Family Fund (2001)
Bob & Alison Murchison Fund (2014)
Murchison/Silvia Charitable Gift Fund (2009)
Murphy Family Fund (2014)
Musser Family Fund (2013)
Mystic Harmony Fund (2000)
Mystic River Watershed Environmental Fund (2011)
Paul F. Nagle Memorial Fund (2006)
Leslie & Sandra Nanberg Charitable Foundation Fund (2001)
Tami E. Nason & Kent A. Lage Fund (2005)
Jean F. and David G. Nathan Fund (1986)
Richfield Family Fund (2000)
Eleanor P. McIntyre Fund (2001)
McSweeney Family Charitable Fund (2009)
Medical Research Fund (1992)
Leila Yassa & David Mendels Fund (2000)
Thomas M. Menino Fund for Boston (2013)
Gilbert G. Menna Family Fund (1999)
Merritt’s Way Fund (2013)
Meyer Foundation (2006)
Allan Meyers Fund for the Advancement of Careers in Disability (2000)
Michon Family Fund (1986)
Microsoft Unlimited Potential Fund (2005)
Miford Street Fund (2014)
Anita L. Mishler Education Fund (1983)
Moccasin Brook Fund (2000)
The Modi Family Pass The Luck Foundation (2012)
Monadnock Fund (2002)
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Muddy Pond Trust Fund (1994)
Munger Family Fund (2001)
Bob & Alison Murchison Fund (2014)
Murchison/Silvia Charitable Gift Fund (2009)
Murphy Family Fund (2014)
Musser Family Fund (2013)
Mystic Harmony Fund (2000)
Mystic River Watershed Environmental Fund (2011)
Paul F. Nagle Memorial Fund (2006)
Leslie & Sandra Nanberg Charitable Foundation Fund (2001)
Tami E. Nason & Kent A. Lage Fund (2005)
Jean F. and David G. Nathan Fund (1986)
Primary Care Progress Fund (2011)
Thomas & Mary Prince Family Fund (2000)
Joseph G. Prone Foundation (2014)
Sue and Bernie Pucker Fund (2002)
Donald and Frances Putnoi Charitable Fund (2006)
Peg Pyne Fund for Handicapped Access (1985)
Quid Nunc Fund (2001)
Sidney R. & Esther V. Rabb Family Fund (1983)
Radtkie Family Fund (1996)
Gene Record Fund (2002)
Sara Delano Redmond Fund (1996)
Remmer-Fox Family Fund (1995)
Reno Family Charitable Foundation (1998)
Rhyme and Reason Family Fund (2000)
Riptide Fund (2002)
Jonathan Rizzo Memorial Foundation Fund (2001)
Roberts Family Fund (1995)
Robynhood Thanksgiving Fund (2002)
Rosedune Fund (1970)
Rosen Family Fund (2008)
Lindsey A. Rosen Fund (2011)
Daniel and Brooke Roth Charitable Gift Fund (2007)
Rothman Charitable Fund (2014)
Rotman-Attardo Family Fund (2005)
Rust Bowl Fund (1987)
Ronni Sachs Kotler Family Fund (2007)
Saffron Circle Fund (2006)
David Salten Fund (2007)
Risha C. and Paul A. Samuelson Fund (1982)
Samuelson Family Gift Fund (2012)
Sands Family Fund (2011)
Kazanjian Sargeant Fund (1996)
Schawbel Family Fund (1995)
Schott Fund (1999)
Schumann Family Fund (2005)
Joel Schwartz Family Fund (2000)
Schwinn Family Charitable Foundation (2011)
September Fund (2000)
A Servant’s Heart (2014)
Norman and Maryellen Sullivan Shachoy Fund (1997)
Shames/Egasti Fund (1991)
Shapiro/Fleishman Fund (1999)
Shawkemo Fund (2000)
SheGives Fund (2014)
Bob and Jean Sheridan Family Fund (2012)
Sherman Family Foundation Fund (2005)
Jon Shevell Cancer Fund (2010)
Jon Shevell Children’s Fund (2010)
Jon Shevell Education Fund (2010)
Shields Family Fund (2006)
Shoe Box Foundation Fund (2004)
Jean Karpas Siegel Fund (1994)
Silvia-Chandley Fund (2014)
John and Susan Simon Boston Foundation Fund (2007)
Sixty-Nine Roses Charitable Foundation (2011)
Skylight Fund (2000)
Fay Slover Fund (2010)
Ellin Smalley Fund (1987)
Austin & Susan Smith Fund (1999)
J. Alper Smith Fund (1996)
Nancy and George Soule Family Fund (1997)
Spector Fund (2001)
Spencer Family Charitable Fund (2014)
David F. Squire Family Fund (1997)
State Street Fund (2012)
Staufenbiel Aley Fund (2009)
Harvey & Shirley Stein Fund (1999)
Stewart Fund (2006)
Stith Hope Fund (2014)
Tracy Stewart Fund (2009)
Charles Sugnet Fund (1998)
Joshua Sugnet Fund (1998)
Suhrbier Family Fund (2005)
Sunrise Fund (1993)
Susan F. Schaeffer Fund (2013)
Sylvan Fund (1985)  
Tempero Family Fund (2002)  
Marc Thompson & Maureen Conway Family Fund (2008)  
Thomsen Family Fund (2000)  
Susan and Michael Thonis Fund (2005)  
Thorvale Fund (2007)  
**TK Foundation** (2014)  
Topol Family Fund (1991)  
Trefler Fund (1997)  
Elizabeth Trichel Joyce Family Fund (2007)  
The Tuukka Rask Foundation (2013)  
Tye Charitable Fund (2006)  
**Violet Iris Fund** (2014)  
Vizzini Fund (1997)  
JH & EV Wade Fund (1990)  
James and Margaret Wade Fund (1997)  
Walker Fund (1998)  
Walsh Brothers Foundation Fund (2010)  
The Walter/Capone Fund (2010)  
J. H. Walton Family Fund (1986)  
Mitchell and Barbara Freedman Wand Charitable Fund (2013)  
Anita Barker Weeks Charitable Gift Fund (2011)  
Wellesley Hills Congregational Church Outreach Fund (2007)  
Whitehead - Sayare Fund (2008)  
Guy and Maggie Wickwire Fund (1989)  
Benjamin J. Williams, Jr. Fund (1986)  
Hope A. Williams Fund (1986)  
Natica R. Williams Fund (1986)  
Ralph B. & Margaret C. Williams Fund (1985)  
Ralph B. Williams, II Fund (1986)  
Winkler Family Foundation Fund (2001)  
Wesley L. Winship Fund (1998)  
Winsor Foundation Fund (1989)  
Howard L. Wolf Memorial Fund (1981)  
Zabin Charitable Fund (2001)  
Emily Zofnass Fund (1998)  
Zug Family Fund (2008)  

**Note:** In addition to the 28 new Donor Advised Funds listed in bold italics above, there were six new anonymous Donor Advised Funds in fiscal year 2015.

**Support Organizations**

Bruce J. Anderson Foundation, Inc. (1980)  
Deshpande Foundation (2007)  
Horace Moses Foundation (1995) to support Junior Achievement  
James M. and Cathleen D. Stone Foundation (1994)


Designated Funds

Designated Funds have been established by donors to support the organizations or issues they care about most. Through these funds, many nonprofit institutions receive crucial annual support and a number of important issues are strengthened every year. The year each fund was established is listed in parentheses. New Designated Funds are bolded and italicized.

1819 Greek Revival Renewal Fund (2011)
ACCESS Education Fund (1985)
Fund for Adult Literacy (1985)
Rae and Aaron Alberts Foundation Fund (2002)
Rae and Aaron Alberts Foundation Fund II (2005)
Frank E. Anderson Fund (1975)
Chip & Barbara Angle Fund (2014)
Area IV Fund (2014)
Red Auerbach Youth Foundation Fund (1983)
Lilian G. Bates Fund (1951)
Be the Change Fund (2007)
Grace & Floyd Lee Bell Fund (1987)
Boston Bar Association Endowment Fund (1983)
Boston Schoolyard Funders Collaborative (1995)
Richard L. Bowser Fund (1985)
BPE/Hancock Endowment for Academics, Recreation & Teaching (1985)
BPE/Support for Early Educational Development Fund (1985)
Herbert Brandshaft Scholarship Fund (2007)
Annie L. Breckenridge Trust Fund (2000)
Brookline Youth Concerts Fund (1995)
Michael and Stella Buonsanto Charitable Fund (2013)
Charles T. Burke Fund for the Watertown Boys and Girls Club (1994)
Charles T. Burke Fund for the Watertown Free Public Library (1994)
Agnes T. Carruth Fund (1983)
James F. Casey Fund (1949)
Dr. Walter Channing Memorial Fund (1933)
Charter Schools Prize Fund (2013)
Philip P. Chase Fund (1955)
Julia Child Fund (1979)
Ellen D. Cholerton Fund (1969)
Ernest & Vera Clivio Charitable Memorial Fund (1981)
Committee to Light Commonwealth Avenue Fund (2011)
Elizabeth Cook ACF Student Fund (1997)
Almon B. Cook-Relief Fund (2001)
Allyn Cox Fund for Essex County Greenbelt (1994)
Thomas G. Curtin - Bobby Kargula Nanae Fund (2009)
Harry Ellis Dickson Youth Concerts Fund (1982)
Joy & George Dryfoos Charitable Fund (2012)
Duggan Charity Fund (1998)
Douglas A. Eaton Memorial Fund (1962)
William V. Ellis Fund for Our Lady of Good Voyage Carillon (2011)
Ruby C. Emerson Fund (1966)
English High School Class of 1934 Award Fund (1994)
Gustavus John Esselen Award for Chemistry in the Public Interest Fund (2008)
Philip M. Fagan Family Fund (1971)

The Students of Selma Fund was created by Bennie and Flash Wiley to make it possible for students in Greater Boston to see the film Selma, the historical drama about Martin Luther King’s voting rights marches in Alabama in 1965. The first such fund was established in New York City and quickly spread throughout the country, raising a total of $2.5 million in 33 cities. Some 11,000 students in Greater Boston experienced the film with the support of the Students of Selma Fund, which raised more than $120,000.
Benjamin M. Feinberg Fund (1962)
Arthur Fiedler Esplanade Concerts Fund (1980)
Mark Hayden Fineman Chess Tournament Fund (1985)
Felix Fox Memorial Fund (1974)
Peter Marshall French Memorial Fund (1976)
Gaywest Farm Fund (1994)
Agnes A. Gidley Memorial Fund (2013)
John & Ethel Goldberg Fund IV (1984)
John & Ethel Goldberg Fund VI (1984)
Bessie P. Goldsmith Fund (1994)
Barbara W. & Frank B. Gopen Fund (1978)
Walter W. Gove Fund (1972)
Elizabeth Grant Fund (1980)
Greatrex Scholarship Fund (1988)
Patricia Jellinek Hallowell Fund (1992)
Hastings-Plummer Fund (1940)
Jorge N. Hernandez Fund (1987)
Gertrude Hooper Fund (1996)
Madeleine C. Huiginn Fund (1993)
Blanche Hyslop Fund (1982)
Orchestra of Indian Hill Music Director Fund (2002)
James W. & Margaret A. Ingraham Charitable Fund (1992)
Ella Jackson Artists and Scholars Fund (1982)
Leslie Gillette Jackson Fund for the Visual Arts and Poetry (2013)
Donaldson F. Jones Fund (1999)
William & Sean Kelley Scholarship Fund (2010)
Kellogg Foundation Grant Operating Fund (2006)
Demetra Kenneth-Brown Fund (1920)
Alice V. Kidder Fund (2001)
Robert D. and Sally G. King Fund (1999)
Kit Clark Senior Services Fund (2000)
Gerald V. Levreault & Claire H. Levreault Fund (2001)
Lawrence B. Lewis Fund (1957)
Ralph Lowell Fund (1982)
Arthur Maass Trust Fund (2001)
MHEAC Fund for ACCESS (1986)
Dorothy Morse Endowment Fund (1999)
Harry D. Neary Fund (1950)
New England Women’s Club Fund (2001)
Robert Treat Paine Historical Trust Fund (1990)
Palazzo San Gervasio Library Fund (1994)
William Morgan Palmer Fund (1977)
Harold Peabody Memorial Fund (1992)
Permanent Fund for Vocational Education (1979)
John M. Pero Scholarship Fund (2014)
Charles & Cornelia Pfaff Fund (1964)
Henry L. Pierce Fund (1958)
Emma K. & Richard Pigeon Fund (1955)
The Plimpton-Poorvu Design Prize Fund (2015)
Primary Care Fellowship Program Fund (1983)
Reading Visiting Nurse Association Fund (1976)
Rogers Fund of the Riverside Cemetery (1997)
Henry A. Root Fund (1926)
Rose Fund (1981)
Fund for Rosie’s Place (1984)
Dr. Jordan S. Ruboy Charitable Fund (1998)
Sheep Pasture Fund (1994)
Bessie H. Short Fund (1997)
Dana P. & Maude E. Simpson Memorial Fund (1998)
Michael Spock Community Service Fund (1980)
Alison L. Stevens Fund (1976)
Eva and William Stillman Scholarship Fund (2013)
Students of Selma Fund (2015)
Surfmen’s Trust Fund (1977)
Agnes & Lewis Taylor Fund (1962)
Frank B. Thayer Fund (1976)
Pauline Toupouras Fund (2010)
   - Carol R. & Avram J. Goldberg Fund (2002)
   - Lawrence & Beth Greenberg Fund (2000)
   - Margarete McNeice Fund (2001)
   - Schoen Family Fund (1999)
   - Tom & Nancy Shepherd Fund (2001)
   - J.C. Tempel Fund for Children (2001)
   - Vinik Family Fund (2000)
   - Peter and Pamela Voss Fund (2000)

Robert E. Wallace Memorial Fund of the Urban League (1992)
Inez Washabaugh Ward, PNP, Scholarship Fund (2011)
Bradford Washburn Fund (1980)
Bill and Estelle Watters Fund (1997)
Jane Wengren Fund (1979)
Stetson Whitcher Fund (1986)
Ernesto “Tito” Whittington Scholarship Fund (2007)
May J. Wikstrom Fund (1998)
Rudolph & Sara Wyner Prize Fund (1985)

Scholarship Funds

Harry Ankeles Scholarship Fund (1992)
Blair Family AvalonBay College Scholarship (2012)
Francis J. Bresnahan Educational Scholarship Fund (1986)
Alex Castoldi Memorial Scholarship Fund (1981)
Paula Marie Danforth Memorial Scholarship Fund (1990)
deVille Fund (1994)
Eagle Bank-Frank E. Woodward Scholarship Fund (1985)
Americo J. Francisco Scholarship Fund (1993)
Albert Francis Gilmartin Memorial Scholarship Fund (2005)
Charles Hammond Fund - Hanover (1972)
Charles Hammond Fund - Springfield (1972)
Janey Fund Scholarship Program (1999)
Nixon Peabody Scholarship Program in Recognition of Retired Managing Partners Robert S. Cummings, Nestor M. Nicholas and Harry P. Trueheart, III (1997)
Francis P. Sears Scholarship Fund (1973)
Paul & Eleanor Young Fund (1988)
Youth Business Institute Scholarship (2014)
High Impact Philanthropy
Becoming a Donor

If you would like to measure your philanthropy by impact created, not just dollars given, the Boston Foundation is the ideal place for you. Boston Foundation donors expect a return on their investment—here measured in human good achieved.

Solving the problems you care about

The Boston Foundation is a complete source of advice about grant making for individuals, families, foundations and corporations at any stage. If you want to give confidently and have the greatest impact on the causes you care about most, whether in Greater Boston or around the globe, we can help you bring it all together.

Offering Donor Advised Funds and Private Foundation Alternatives

The Boston Foundation has been a Donor Advised Fund expert for more than 30 years. With hundreds of these funds and decades of experience working with donors, we can help you meet your charitable goals. Establishing a fund at the Foundation is ideal for those who want the prestige of a private foundation, but none of the administrative, legal, tax and regulatory burdens of a private foundation.

Maximizing your giving with TPI

The Philanthropic Initiative (TPI), now a business unit of the Boston Foundation, is an internationally recognized provider of philanthropic consulting and management services. A pioneer in the field of strategic philanthropy for 25 years, TPI continues to advise individuals, families, foundations and corporations in the U.S. and around the globe, helping clients maximize the impact of their philanthropy by defining priorities and strategies, implementing programs and evaluating success. Building from the values and interests of each client, TPI delivers innovative, customized solutions.

Supporting Systemic Change Through the Civic Leadership Fund

By working with the Boston Foundation, you become part of a dynamic community of change makers. Through policy leadership, the Boston Foundation has helped to leverage hundreds of millions of dollars in federal and state funds, pass legislation in K-12 education, restructure our community college system, provide crucial state funds for cultural facilities and much more. This work is supported by the Civic Leadership Fund at the Boston Foundation, which is contributed to by hundreds of donors every year.
Helping You Plan a Lasting Legacy with the Permanent Fund for Boston.

As the Foundation’s endowment, the Permanent Fund for Boston does today what it will do 100 years from now: It provides the resources the Foundation needs to respond nimbly to the most pressing issues of the day. We can help you plan a lasting legacy by creating a Named Fund or Field of Interest Fund as part of the Permanent Fund for Boston—and help you plan the best way to incorporate this kind of legacy giving into your estate planning, including gifts by will or trust, gifts of retirement plan assets and life insurance, and gifts that pay you income and preserve assets for your heirs.

For more information about becoming a donor or making a planned or legacy gift to the Boston Foundation, visit www.tbf.org/solve.
All of the Boston Foundation’s discretionary grant making in Greater Boston relies on the resources of our endowment, the Permanent Fund for Boston, which represents some $16 million of the Foundation’s overall giving annually. The Permanent Fund for Boston has been built over the years through outright gifts and bequests from Boston area donors who care deeply about our community.

**Five Impact Areas and Two Crosscutting Strategies**

The Boston Foundation’s five impact areas guide much of our grant making as well as our research, convenings, public policy work and special initiatives. The Foundation invests the majority of its resources in proven or promising organizations and initiatives that seek to deepen their impact or bring their work to scale and are significantly aligned with the Foundation’s five impact areas:

- Education
- Health & Wellness
- Jobs & Economic Development
- Neighborhoods & Housing
- Arts & Culture

Visit [www.tbf.org/grants](http://www.tbf.org/grants) for detailed goals for each of these Impact Areas.

The Boston Foundation also has two Crosscutting Strategies:

- **Our NONPROFIT EFFECTIVENESS** strategy aims to strengthen the Massachusetts nonprofit sector and enhance the impact of the Foundation’s grantees. Work in this area includes the Giving Common, an open online database with more than 1,000 nonprofit profiles connecting donors, funders and other stakeholders. See more at [www.givingcommon.org](http://www.givingcommon.org).

- The **GRASSROOTS** strategy seeks to respond quickly and nimbly to community needs, with grants that range from $200 to $10,000 to grassroots organizations that are anchored in Boston’s neighborhoods.

**Types of Grants**

**Grants Aligned with Our Five Impact Areas**

The Foundation invests the majority of its resources in proven or promising organizations and initiatives that seek to deepen their impact or bring their work to scale. We emphasize deep and long-lasting partnerships with nonprofits that are closely aligned with our five primary impact areas.

The Foundation makes general operating support grants to core partners on a quarterly basis, without specific deadlines for proposals, as well as program and project grants where appropriate. Nonprofit organizations that are eligible for these grants are encouraged to begin by contacting a program director.
Open Door Grants

The Boston Foundation is also responsive to the needs and opportunities expressed by the community and supports important organizations and promising ideas that do not align with the goals and methods pursued within our five impact areas.

Both new and existing nonprofit organizations in Greater Boston can apply for Open Door Grants to support efforts to meet existing needs, including organizational capacity building as well as the testing of new ideas and innovations that address the most critical challenges facing our community.

There are four deadlines every year and grants are made for one year at a time and for up to two consecutive years. Generally, grants range from $10,000 to $50,000 and support:

- Innovative and emerging ideas for new or existing organizations;
- Proven ideas from existing organizations; and
- Capacity building for new and existing organizations.

Visit www.tbf.org/grants for detailed guidelines for applying for both types of grants.
The Boston Foundation has a mandate both to fulfill its role as Greater Boston’s community foundation today—by maximizing the dollars available for making grants—and ensuring that the charitable dollars entrusted to the Foundation are available to continue this work tomorrow and in perpetuity. Robust development efforts and a well-diversified investment strategy enable the Foundation to meet these objectives.

**Fund for the 21st Century**

The Boston Foundation offers three separate investment pools within the Fund for the 21st Century. These three pools allow donors to select the option that best matches the time horizon of their charitable giving plans. Donors may also customize their asset allocation by investing among all three pools. The Balanced Plus Pool asset mix is expected to produce the highest long-term investment return. Accordingly, the Boston Foundation invests its endowment assets in the Balanced Plus Pool.

**Financial Oversight**

The Foundation’s Investment Committee establishes investment policy and monitors the individual investment managers and their performance, and the Board sets each year’s spending rate. The Investment Committee is assisted by an independent investment consulting firm.

**INVESTMENT PERFORMANCE:** as of June 30, 2015

<table>
<thead>
<tr>
<th>Fund for 21st Century Investment Options:</th>
<th>1 YEAR</th>
<th>3 YEARS</th>
<th>5 YEARS</th>
<th>10 YEARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balanced Plus Pool</td>
<td>2.2%</td>
<td>9.4%</td>
<td>8.9%</td>
<td>6.3%</td>
</tr>
<tr>
<td>Balanced Pool (established 2/1/11)</td>
<td>&lt;.5%&gt;</td>
<td>8.2%</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Short-Term Pool (established 1/1/10)</td>
<td>0.06%</td>
<td>0.08%</td>
<td>.11%</td>
<td>n/a</td>
</tr>
</tbody>
</table>

**Benchmarks:**

| 65% MSCI A.C. World/35% Citigroup World Bond Index | <2.7%> | 7.4% | 8.2% | 5.6% |
| MSCI All Country World Stock Index                | .7%    | 13.0%| 11.9%| 6.4% |
| S & P 500 Stock Index                             | 7.4%   | 17.3%| 17.3%| 79%  |
| Citigroup World Bond Index                        | <9.0%> | <2.4%> | 1.1% | 3.1% |
The assets of the Balanced Plus Pool include not only traditional stock and bond investments, but participation in private equity, venture capital, real assets (real estate, timber and energy) and flexible capital strategies. Diversification among multiple asset classes helps to reduce the volatility of the Foundation’s endowment and should moderate market risk.

**The Spending Policy**

By using a spending policy, the Foundation helps to ensure that the charitable funds will be protected for the future, while continuing to have the most impact today. The 2015 spending rate was 6.4% for its permanently restricted discretionary funds. For Fiscal Year 2016, the Board again approved a spending rate of 6.4% for its discretionary endowment. The Foundation uses a smoothing mechanism that helps balance the current endowment market value and the previous level of spending. Spending is equal to 70% of spending from the previous year, adjusted for inflation, plus 30% of the 6.4% spending rate applied to the current market value. The approved spending policy rate for designated endowment funds is 5.0% for Fiscal Year 2016.

**The Philanthropic Initiative**

The Philanthropic Initiative, Inc. (TPI) is a significant business unit of the Foundation. TPI designs, carries out and evaluates philanthropic programs for individual donors, families, foundations and corporations. The experience and reputation of TPI significantly expands the range of philanthropic services the Foundation offers. During Fiscal Year 2015, the operations of TPI added $2 million of service fee income to the operations of the Foundation.

**Financial Analysis**

Total assets of the Boston Foundation decreased slightly from $1 billion to $992 million at June 30, 2015. For the year, net investment returns for the Balanced Plus Pool were 2.2%. During this period, the Foundation received $123 million in contributions and paid $135 million in grants. Expenditures for program support and operating expenses totaled $19.8 million thus explaining the change in total assets. The investment environment was positive during the year and the Foundation continued its investment in the communities that it serves.

**Audited Financial Statements**

The Foundation’s financial statements are prepared under policies and procedures overseen by the Foundation’s independent Audit Committee and the Board of Directors. The statements are audited by KPMG LLP. A summary of the audited financial statements is shown on page 54. The audited statements and Form 990 are available on our website at www.tbf.org.
## 2015 and 2014 Summary Financial Statements
(in thousands)

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investments</td>
<td>$958,273</td>
<td>$971,648</td>
</tr>
<tr>
<td>Receivables &amp; Other</td>
<td>9,215</td>
<td>7,329</td>
</tr>
<tr>
<td>Cash Equivalents</td>
<td>24,765</td>
<td>24,717</td>
</tr>
<tr>
<td>Total Assets</td>
<td>$992,253</td>
<td>$1,003,694</td>
</tr>
<tr>
<td><strong>Liabilities &amp; Net Assets:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts Payable and Other Liabilities</td>
<td>$5,894</td>
<td>$6,486</td>
</tr>
<tr>
<td>Grants Payable</td>
<td>668</td>
<td>9,267</td>
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<tr>
<td>Net Assets</td>
<td>985,691</td>
<td>987,941</td>
</tr>
<tr>
<td>Total Liabilities &amp; Net Assets</td>
<td>$992,253</td>
<td>$1,003,694</td>
</tr>
<tr>
<td><strong>Revenues:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions</td>
<td>$122,531</td>
<td>$111,891</td>
</tr>
<tr>
<td>Service Fee Income</td>
<td>1,896</td>
<td>1,954</td>
</tr>
<tr>
<td>Net Investment Return</td>
<td>20,589</td>
<td>128,662</td>
</tr>
<tr>
<td>Total Revenues</td>
<td>145,016</td>
<td>242,507</td>
</tr>
<tr>
<td><strong>Grants &amp; Expenses:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td>127,264</td>
<td>110,566</td>
</tr>
<tr>
<td>Change in Split Interest Trusts</td>
<td>197</td>
<td>310</td>
</tr>
<tr>
<td>Program Support</td>
<td>4,504</td>
<td>6,651</td>
</tr>
<tr>
<td>Operating Expenses</td>
<td>15,301</td>
<td>14,486</td>
</tr>
<tr>
<td>Total Grants &amp; Expenses</td>
<td>147,266</td>
<td>132,013</td>
</tr>
<tr>
<td><strong>Change in Net Assets</strong></td>
<td>&lt;2,250&gt;</td>
<td>110,494</td>
</tr>
<tr>
<td>Net Assets Beginning of Year</td>
<td>987,941</td>
<td>877,447</td>
</tr>
<tr>
<td>Net Assets End of Year</td>
<td>$985,691</td>
<td>$987,941</td>
</tr>
</tbody>
</table>

The financial statements include all funds held by the Foundation, including the Fund for the 21st Century.
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The Boston Foundation is overseen by a distinguished Board of Directors, selected to represent the broad diversity of our community’s interests and needs. All grants from the Foundation are approved by the Board, which also sets policy and guides the Foundation as it fulfills its mission.
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John Rielly, Senior Information Systems Analyst
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